Broadcast Reports

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Using this Training Manual

When you attend HRIS Training, this manual will be used to outline the process. In the class you will learn specifics on how to process an individual action.

After training, additional resources can be found on the HRIS Website, including a link to Self Directed Help. This section of the training manual will provide an outline of the naming conventions and setup/flow of the training material.

Text Conventions

The manual is setup using standard text conventions and distinct visual elements to make training easier to follow.

Format	Meaning
Bold	Name of a Form/Field. A manual title. An emphasized word/phrase. A placeholder for a user-defined value.
Italics	A key name. For example, Shift and Enter are key names.

Visual Elements

Visual elements are provided for certain types of information to draw your attention to that element/concept.

Format	Meaning
	Tip – provides miscellaneous information about facts that might be of interest to you as you complete the process.
	Warning or Important Note – provides critical points or items that you must address as you complete the process.
	Exercise – indicates Exercise

Screen Captures
Screen Captures are provided prior to each Task Step Chart. The capture will identify the Form Name and Form Number according to the task. The numbers identified on the screen capture correspond to the numbered tasks in the chart.

Example:

Task Step Chart
The Task Step Charts are set up to easily identify each necessary step taken with follow through explanation to make training easier to follow.

Format	Meaning
Number Column	This number identifies, on the screen capture, the order the steps are to be taken (in sequence)
HRIS FIELD	This identifies the field on the form that your action is required.
R/O	This will tell you if the field you are working on is a **R**equired field or an **O**ptional field.
Step/Action	This will identify what needs to be entered in the current field.
Expected Result	This will identify the result of your current action taken. If the task step chart is blank, make sure to always check the lower left hand corner of your screen for messages from HRIS.
Notes/Additional Information	This will identify Warning or Important Note – provides critical points or items that you must address as you complete the process.

HRIS Basics

HRIS has a number of standard features that work the same regardless of the field you are on in the system.

HRIS Forms

- ➢ HRIS Forms will always open with the fields blank.
- ➢ When navigating in HRIS, you can move from field to field by pressing the Tab button on your keyboard, or clicking your mouse in each new field.
- ➢ You must then type or select from a drop down menu the items you want to fill into your fields. If you transfer from another HRIS form, some of the data from the previous form (ex. Company and Employee EIN) will fill in those same data items on the new form.

Comparing Fields on HRIS Forms

There are key fields, which are required on HRIS Forms.
- ➢ All information should be entered in CAPITAL LETTERS.

Name: | ANDREW

- ➢ Do not use punctuation.

Address 1: | 456 ARROWHEAD LN

- ➢ Phone numbers are input with periods. (602.111.1111)
- ➢ Information is Added/Changed/Inquired on using the navigation bar. You can also use the buttons Next/Previous to move between Employee records.

| Add | Change | Delete | Inquire | Next | Previous |

HRIS System Messages

- ➢ Always check the bottom left corner of a form for system messages such as "Add Complete-Continue."

- ➢ HRIS has built in edits to validate information. For example:
    - o The Social Security Number is checked by HRIS to see that it is in the correct format and it does not already exist.

Introduction

Broadcast is used to view reports that are distributed to the agencies. The reports can be viewed online and/or printed through an Internet browser. Broadcast stores previous copies of the reports for a specific period of time so you can go back and look at historical data. You can also compare a current report to a historical report.

There are three different types of Broadcast reports: Benefits, Human Resources, and Payroll. Your job role determines the types of reports you can view. **Access to Broadcast reports is not granted automatically with your job role. You must have your HRIS security administrator request it for you**. The reports will be available from the time security access was granted going forward. You will not be able to see any of the reports that have run in the past.

Most Broadcast reports are run either daily or biweekly. Since some of the reports are error or update reports, you will not receive a report if there are no errors or updates for that day.

This lesson begins with the steps to add the Broadcast link to your portal window. If you already have the link, skip to Opening the Broadcast Window (Page 9).
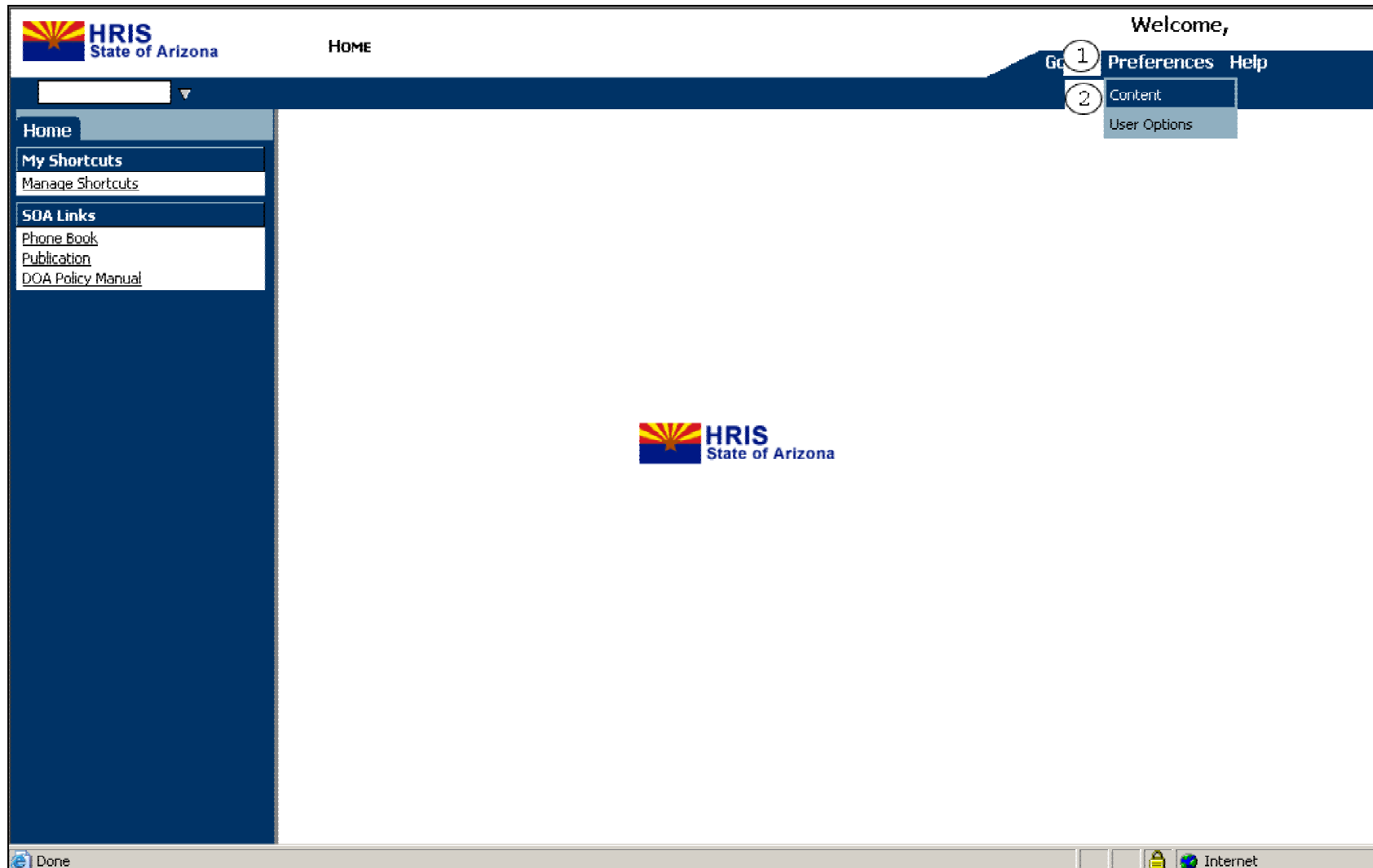
Helpful Hints

If the report is too big or too small when viewing, go to Changing the Font Size for Viewing (Page 14).

If the report doesn't fit on the page when printing, go to Changing the Font Size for Printing (Page 20).

If a lot of extra pages are printing and they are mostly blank, go to Printing Through Print Preview (Page 22).

Adding the Broadcast Link

Main Portal Screen

	HRIS Field	R/O	Step/Action	Expected Results	🛑Notes/ Additional Information
1	Preferences	R	Click on Preferences	The Preferences drop down menu appears.	
2	Content	R	Click on Content	The Content screen opens	If you already have the link, skip to Opening the Broadcast Window (Page 9).

Content Screen

	HRIS Field	R / O	Step/Action	Expected Results	🛑Notes/ Additional Information
1	Broadcast	R	Double click on Broadcast in the Subscriptions list	The Broadcast link moves to the right under Navigation	• If you don't see Broadcast in the Subscriptions list, you may not be authorized to use Broadcast. o Contact your HRIS security administrator. • If the Broadcast link doesn't have a check mark next to it, click in the check box to activate the link before double clicking it. • If the Broadcast link moves to the right under Main Content, double click it to move it back under Subscriptions and try again. o Broadcast will not work correctly if it's in Main Content.
2	Save	R	Click on Save	An information window pops up asking if you want to reload the portal	
3	Reload Portal Message	R	Click on OK	You are returned to the main portal screen and the Broadcast link appears in your left navigation pane	To view the broadcast reports, continue with section Opening the Broadcast Window (Page 9).

Opening the Broadcast Window

	HRIS Field	R/O	Step/Action	Expected Results	🛑Notes/ Additional Information
1	Broadcast	R	Click on the Broadcast link in the left navigation pane	Broadcast opens in its own window	• You may be prompted again for your ID and password. • The Broadcast window is separate from the portal window so you can still look up information in HRIS if you need to.
2	N/A – Maximize Button	R	Click on the maximize button	The Broadcast window expands to full screen size for better viewing	• If a message appears across the screen that you are not subscribed to any channels, contact the HRIS Help Desk and select the Security option. o You won't be able to do anything further until this issue is resolved. • To view the broadcast reports, continue with section Viewing Broadcast Reports (Page 11).

Viewing Broadcast Reports

	HRIS Field	R/O	Step/Action	Expected Results	⛔Notes/ Additional Information
1	Drop Down Menu 1	R	Click on the drop down menu and select the type of report you want to view	The first report of that type displays in the window	• Three types of reports are available: Benefits, Human Resources and Payroll. • Your job role determines the reports you are authorized to view. o You may not see all three choices in the drop down menu.
2	Drop Down Menu 2	R	Click on the drop down menu and select the name of the report you want to view	The report you selected displays in the window	This menu shows the reports that are available and will change depending on the type of report you selected in Step 1.
3	Drop Down Menu 3	R	Click on the drop down menu and select the agency/process level you want to view	The report with the agency/process level you selected displays in the window	• This menu shows the agencies/ process levels that are available and will change depending on the report you selected in Step 2. • If the agency/process level you want is not listed, scroll down to the bottom of the menu and click on "next selections". o You will need to click on the drop down menu again to see the new list of agencies/process levels. • If the report is too big or too small, go to Changing the Font Size for Viewing (Page 14)
4	History Drop Down Menu	O	Click on the History drop down menu and select the date of the report you want to view	The report you selected displays in a new window	• If the date of the report you want is not listed, scroll down to the bottom of the menu and click on "next selections". o You will need to click on the drop down menu again to see the new list of report dates. • Sometimes the history report will be "hidden" behind the main Broadcast window. o If you don't see the history report, minimize the main Broadcast

	HRIS Field	R/O	Step/Action	Expected Results	🛑Notes/ Additional Information
					window. • When you are done viewing the history report click on the "X" to close the window and return to the main Broadcast window. ○ If you minimized the main Broadcast window you will have to go to your taskbar and click on the e-Broadcasting button to maximize it.
5	Compare Field	O	Click in the compare box (a check mark should appear) then click on the History drop down menu and select the date of the report you want to compare to the current report	The current report displays on the right and the history report displays on the left	To return to a single report view, click in the compare box to remove the check mark then click on the History drop down menu and choose "current publication".

When viewing a Broadcast report, you can also:

- Change the font size of the data displayed – see Changing the Font Size for Viewing (Page 14)
- Print the report, including printing a History report, printing from print preview, or changing the font size for printing – see Printing Current Reports (Page 16)
- Logout of Broadcast – see Logging Out of Broadcast (Page 24)

Changing the Font Size for Viewing

	HRIS Field	R/O	Step/Action	Expected Results	🛑Notes/ Additional Information
1	Personalize icon	R	Click on the personalize icon	The "Personalize Your e-Broadcasting Viewer" window opens	
2	Global Properties	R	Click on the Global Properties drop down menu and select "font size for viewing standard reports"	The "Global Properties Viewer Font Size" window opens	

3	Viewer font size	R	Type a 1, 2 or 3 in the box and click on Set	Nothing will change on the screen	• Only 3 font sizes are available.
					  o 1 is the smallest and 3 is the largest.
					  o You can change the size as often as you want and you may want to use different sizes for different reports.

4	Close & Update Viewer	R	Click on Close & Update Viewer	A window pops up asking you to select OK to reload the viewer	
5	OK Box	R	Click on OK	The Broadcast window reloads and the report is displayed with the new font size	

Printing Current Reports

	HRIS Field	R / O	Step/Action	Expected Results	🛑Notes/ Additional Information
1	Printer icon	R	Click on the printer icon	A window pops up with printer settings	If a security alert pops up, click OK.
2	Print-local	R	Click on the print-local button	A Print window pops up with a list of printers	• If no printers appear, contact your technical support staff. • Your print window may appear differently depending on the Microsoft Windows and Microsoft Office versions running on your computer.
3	N/A – Print Window	R	Click on the printer you want to use	The printer name should be highlighted	
4	N/A	R	Click on the Basics tab and click on Landscape	A dot (●) appears next to the word Landscape	• If you don't have a Basics tab the Landscape option may appear on the General tab. • You may also be able to access the Basics tab by clicking Preferences, then Basics.
5	N/A – Print Button	R	Click on the Print button	The report prints	• If the report doesn't fit on the page, go to Changing the Font Size for Printing (Page 20. • If extra pages are printing and they are mostly blank, go to Printing Through Print Preview (Page 22).

Printing History Reports

	HRIS Field	R / O	Step/Action	Expected Results	⬣Notes/ Additional Information
1	N/A	R	Click on File then click on Print	A Print window pops up with a list of printers	• The history report window doesn't have a printer icon like the main Broadcast window, so you must use the File menu. • If no printers appear, contact your technical support staff. • Your print window may appear differently depending on the Microsoft Windows and Microsoft Office versions running on your computer.
2	N/A	R	Click on the printer you want to use	The printer name should be highlighted	
3	N/A	R	Click on the Basics tab and click on Landscape	A dot (●) appears next to the word Landscape	• If you don't have a Basics tab the Landscape option may appear on the General tab. • You may also be able to access the Basics tab by clicking Preferences, then Basics.
4	N/A	R	Click on the Print button	The report prints	• If the report doesn't fit on the page, go to Changing the Font Size for Printing (Page 20. • If extra pages are printing and they are mostly blank, go to Printing Through Print Preview (Page 22).

Changing the Font Size for Printing

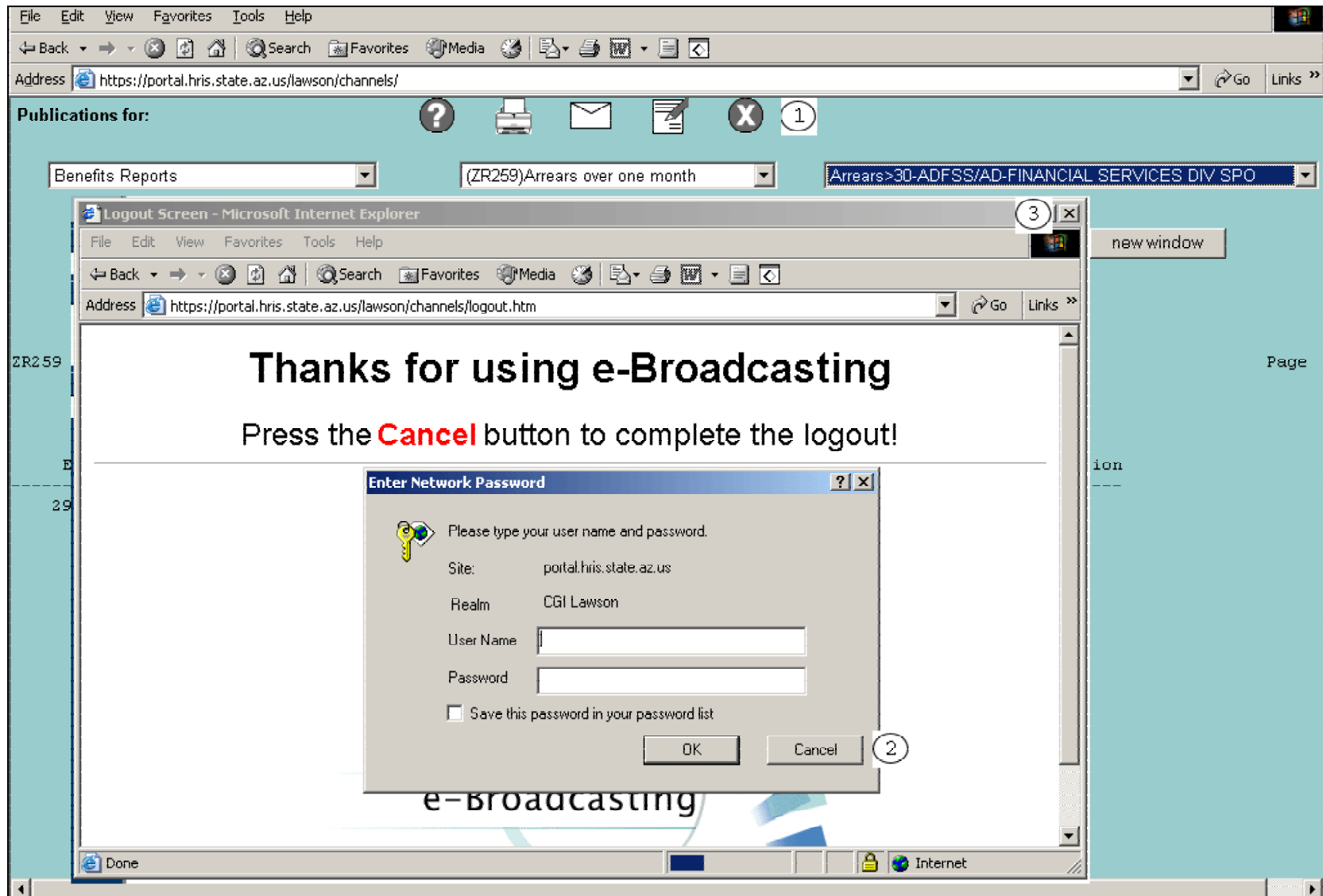|	HRIS Field	R / O	Step/Action	Expected Results	🛑Notes/ Additional Information
1	Personalize icon	R	Click on the personalize icon	The "Personalize Your e-Broadcasting Viewer" window opens	
2	Global Properties	R	Click on the Global Properties drop down menu and select "font size for local printing"	The "Global Properties Font Size for Local Printing" window opens	

3	Print-local font size	R	Type a 1, 2 or 3 in the box and click on "set print-local font"	Nothing will change on the screen	• Only 3 font sizes are available.
					  o 1 is the smallest and 3 is the largest.
					  o You can change the size as often as you want and you may want to use different sizes for different reports.

4	Close & Update Viewer		Click on Close & Update Viewer	An information window pops up asking you to select OK to reload the viewer	
5	N/A	R	Click on OK	The Broadcast window reloads	The new font size will be used the next time you print the report.

Printing Through Print Preview

	HRIS Field	R / O	Step/Action	Expected Results	🛑Notes/ Additional Information
1	N/A	R	Click on File then click on Print Preview	The Print Preview window opens	Your print window may appear differently depending on the Microsoft Windows and Microsoft Office versions running on your computer.
2	N/A	R	Click on the drop down menu and select "Only the selected frame"	The report preview will change	Don't worry if your report is not showing up in landscape mode. You will change that in the next step.
3	N/A	R	Click on Print, select the printer, then click on the Basics tab and click on Landscape	A dot (●) appears next to the word Landscape	• If you don't have a Basics tab the Landscape option may appear on the General tab. • You may also be able to access the Basics tab by clicking Preferences, then Basics.
4	N/A	R	Click the Print button	The report prints	If the report doesn't fit on the page, go to Changing the Font Size for Printing (Page 20).

Logging Out of Broadcast

	HRIS Field	R/O	Step/Action	Expected Results	🛑 Notes/ Additional Information
1	X	R	Click on the	The logout screen opens	
2	N/A	R	Click on the Cancel button	The "Enter Network Password" window closes and the login screen opens	
3	N/A	R	Click on the X	The login screen closes	